IATA CARGO DAY COLOMBIA

Bogotá - November 11, 2026

HOST AIRLINE

avianca cargo

Tendencias Globales de Carga Aérea y Actualización de Capacidad



Brendan Sullivan
IATA

What will tomorrow's air cargo customer expect?

Brendan Sullivan

Global Head of Cargo, IATA

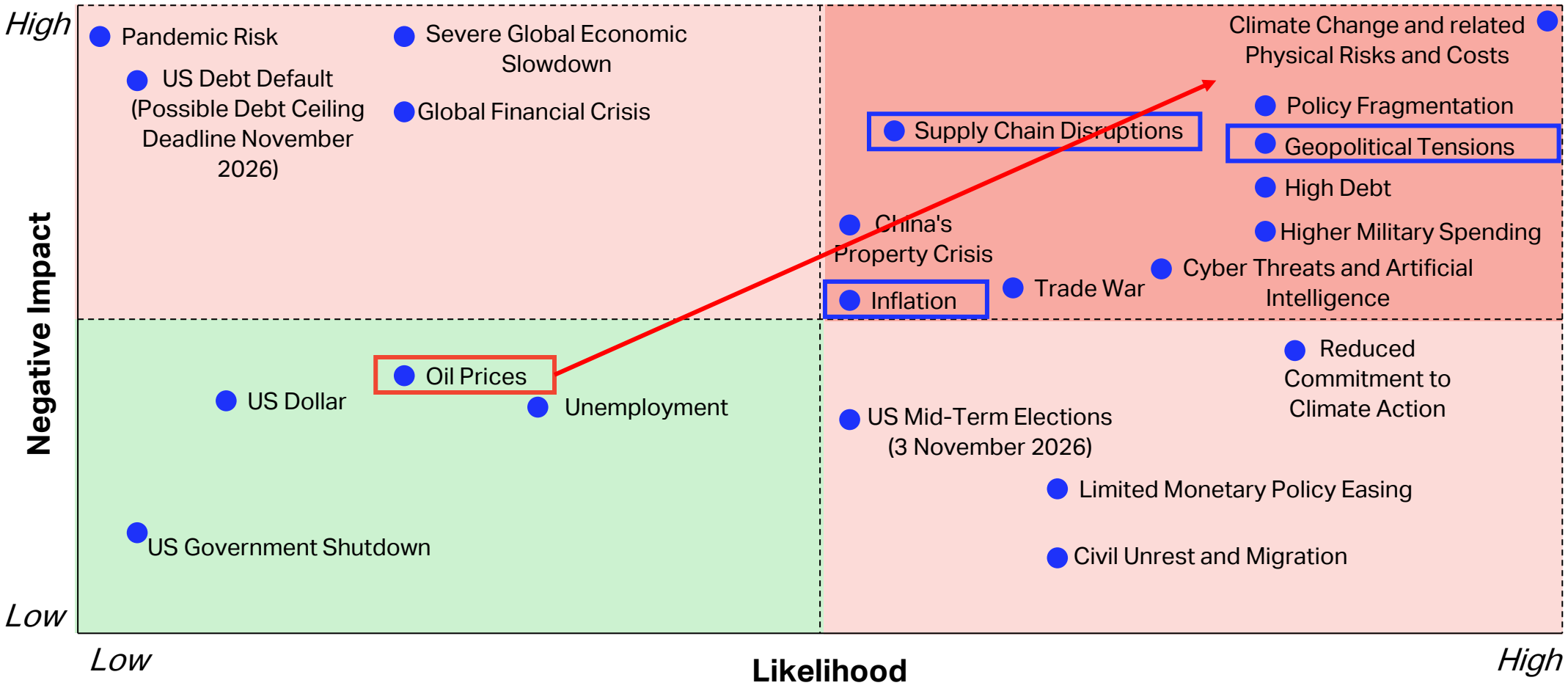


The New Trade Map

Why a fragmented world needs agile air cargo



2026 Risks: Converging Vulnerabilities

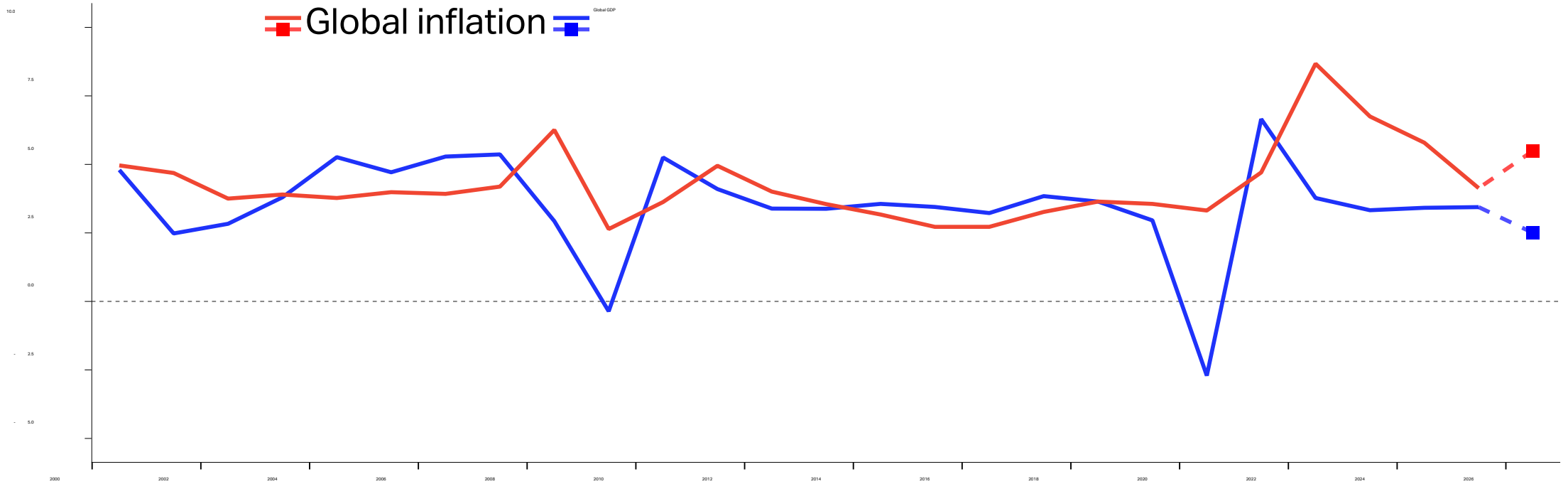


Source: IATA Sustainability and Economics.

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The energy shock slows growth and accelerates inflation

Global GDP and global inflation forecasts, annual, %

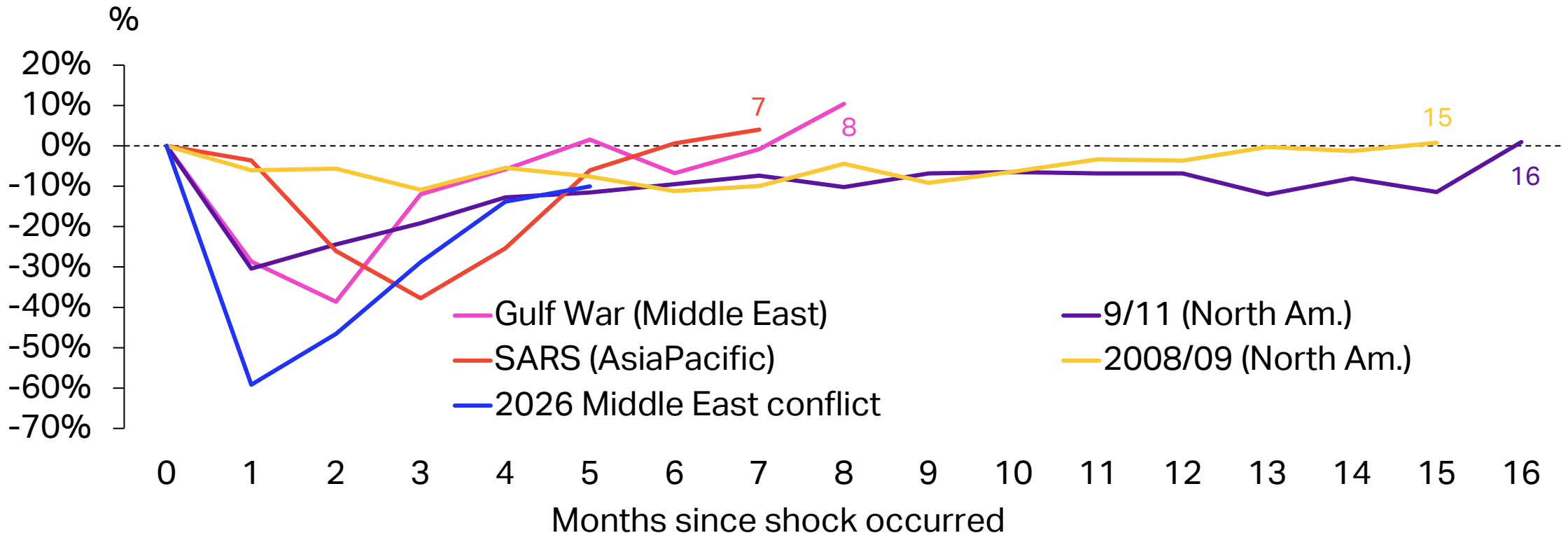


Source: IATA Sustainability and Economics, Macrobond.

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Recovery from major regional shocks typically takes about a year

Regional recovery of traffic after various shocks (most affected region), % of RPK change against the same month before the shock



Source: IATA Sustainability and Economics, IATA Information and Data – Monthly Statistics.

Growth amidst trade and geopolitical challenges

7.7 % YoY – increase in global air cargo demand (CTKs) in September, maintaining a strong growth trajectory. Growth was recorded across all carrier regions, although performance varied by market.

3.6 % YoY – Global trade growth in august, extending the run of consecutive monthly expansion to 42 months.

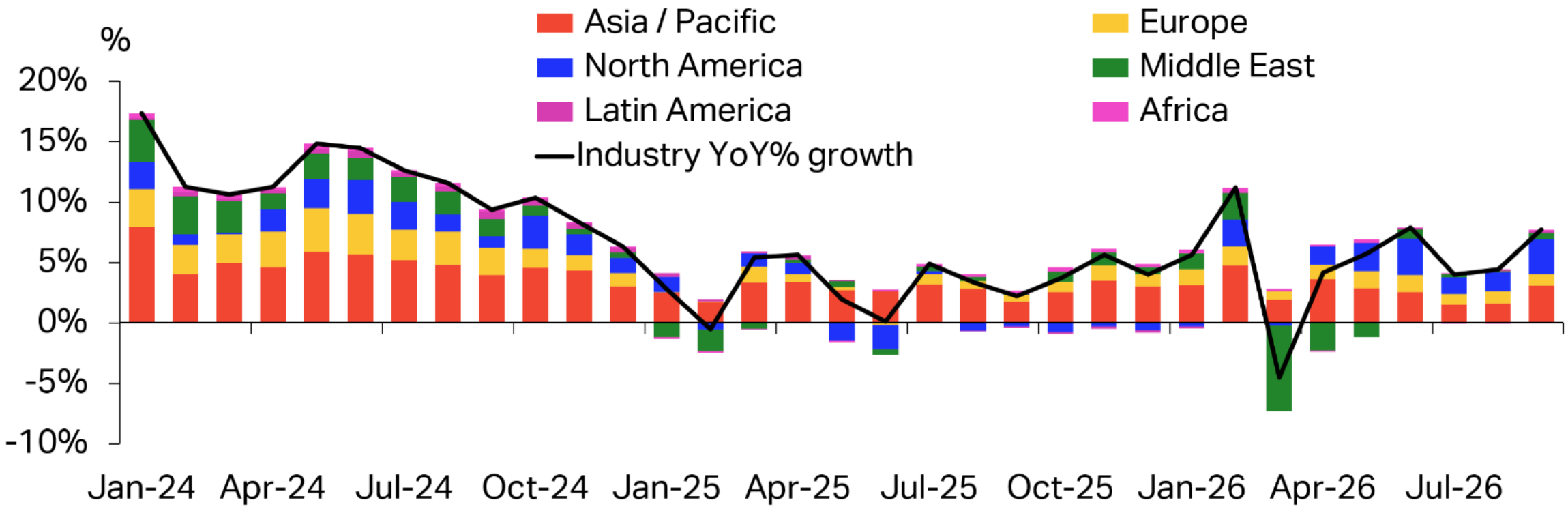
2.7 % YoY – growth in cargo capacity (ACTKs) below demand growth.



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Air cargo recovered quickly from Middle East disruption

Contribution to global cargo traffic growth, % YoY

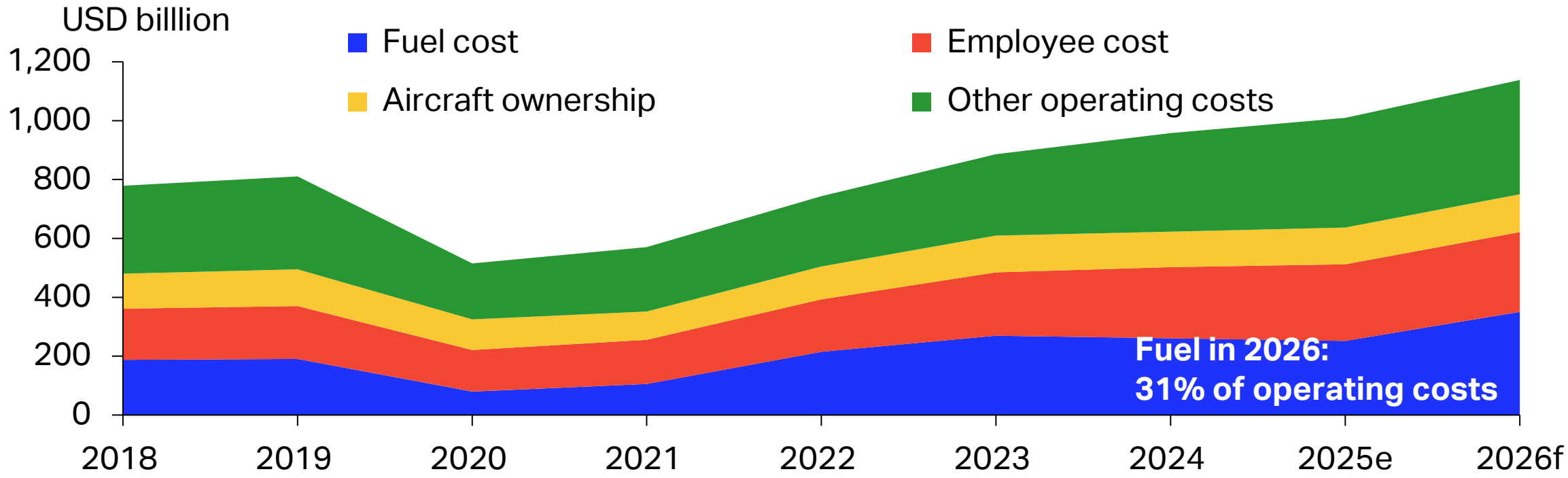


Source: IATA Sustainability and Economics, IATA Information and Data – Monthly Statistics.

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Fuel to rise to 31% of airline operating costs in 2026

Breakdown of costs, pre-tax level, USD billion



Source: IATA Sustainability and Economics using data from Airfinance Global.

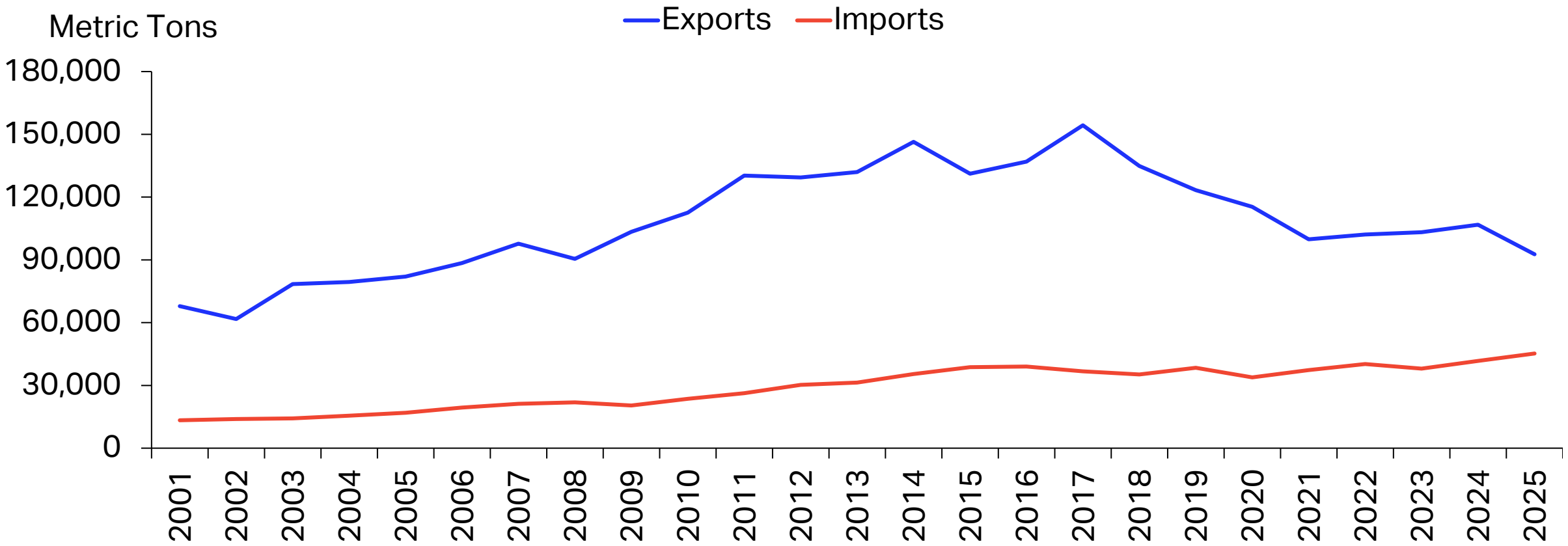
Colombia’s Air Cargo: A Decade of Rising Value



IATA Sustainability and Economics

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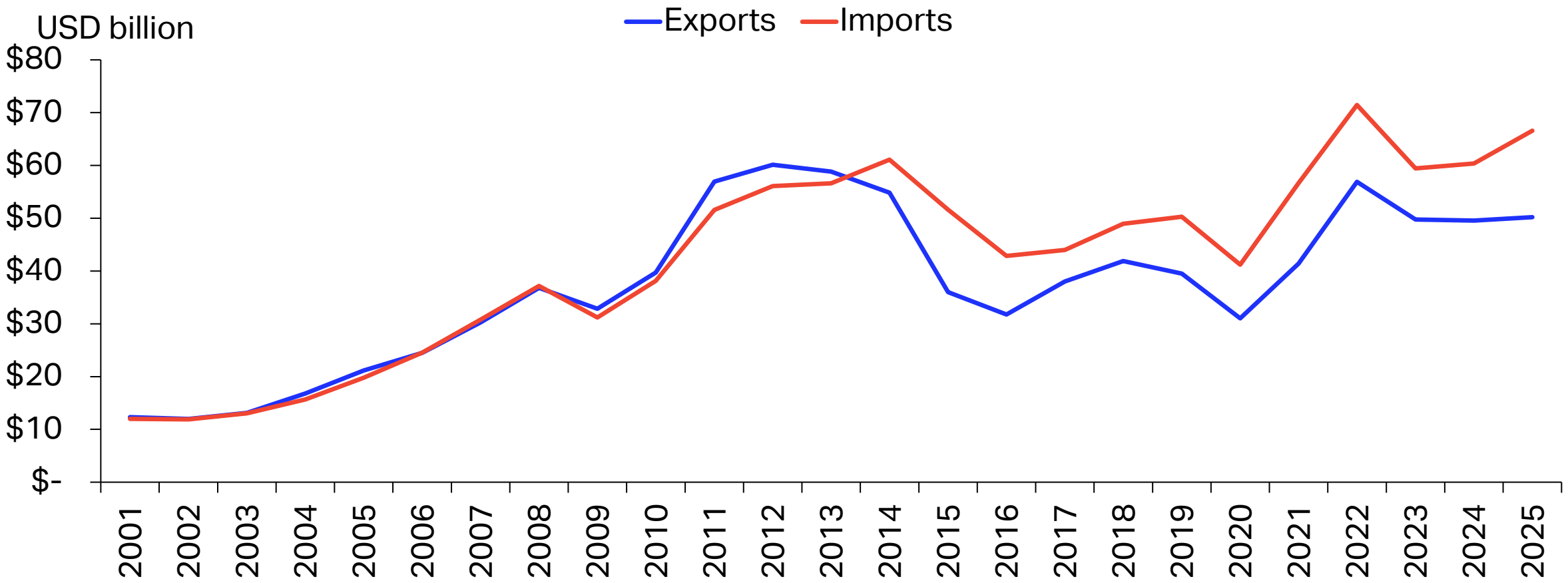
From 2001 to 2025, export weight grew on average per year by 1.3% and import weight by 5.2%



Source: IATA Sustainability and Economics, based on Colombia's National Tax and Customs Directorate (DIAN).

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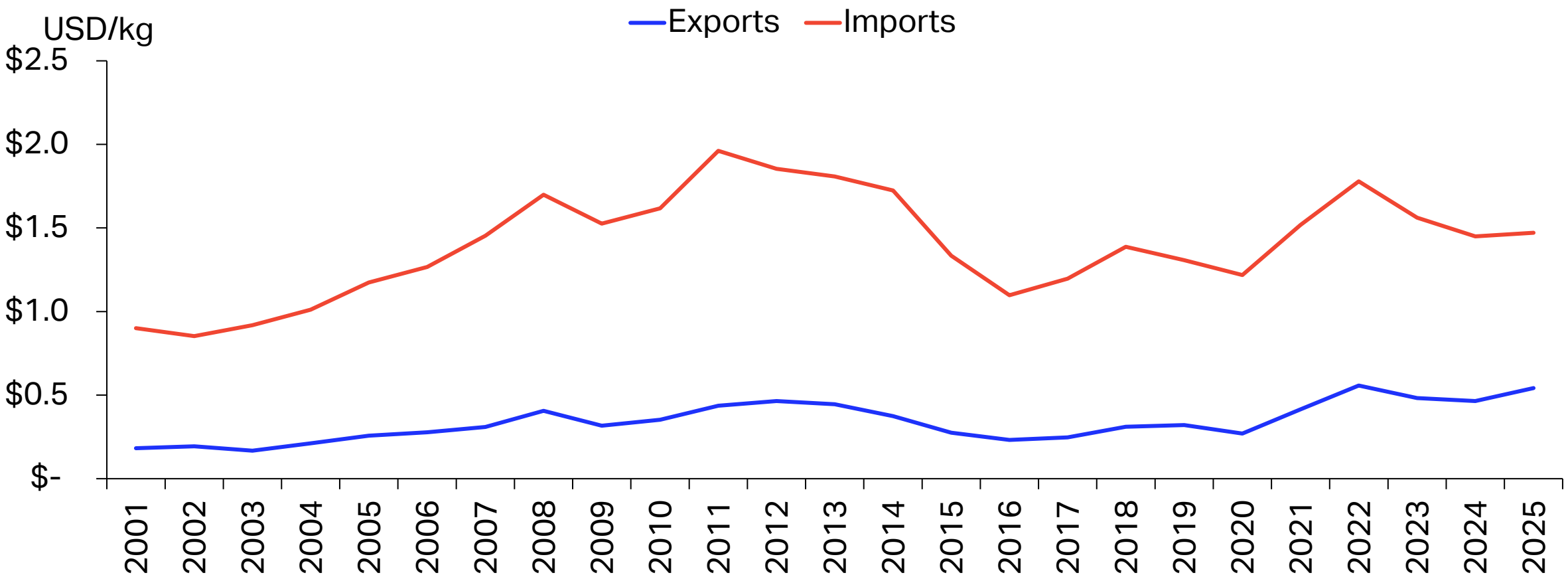
From 2001 to 2025, export value grew on average per year by 6.0% and import value by 7.4%



Source: IATA Sustainability and Economics, based on Colombia's National Tax and Customs Directorate (DIAN).

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From 2001 to 2025, export value per kg grew on average 4.7% per year and import value per kg by 2.1%

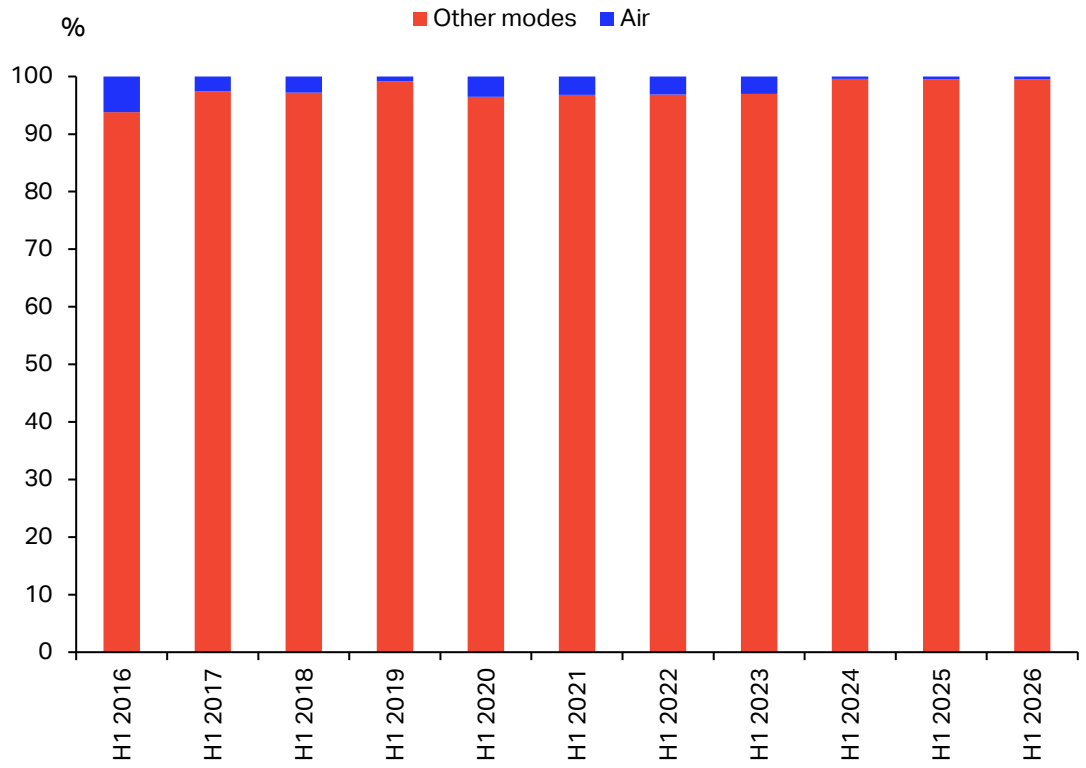


Source: IATA Sustainability and Economics, based on Colombia's National Tax and Customs Directorate (DIAN).

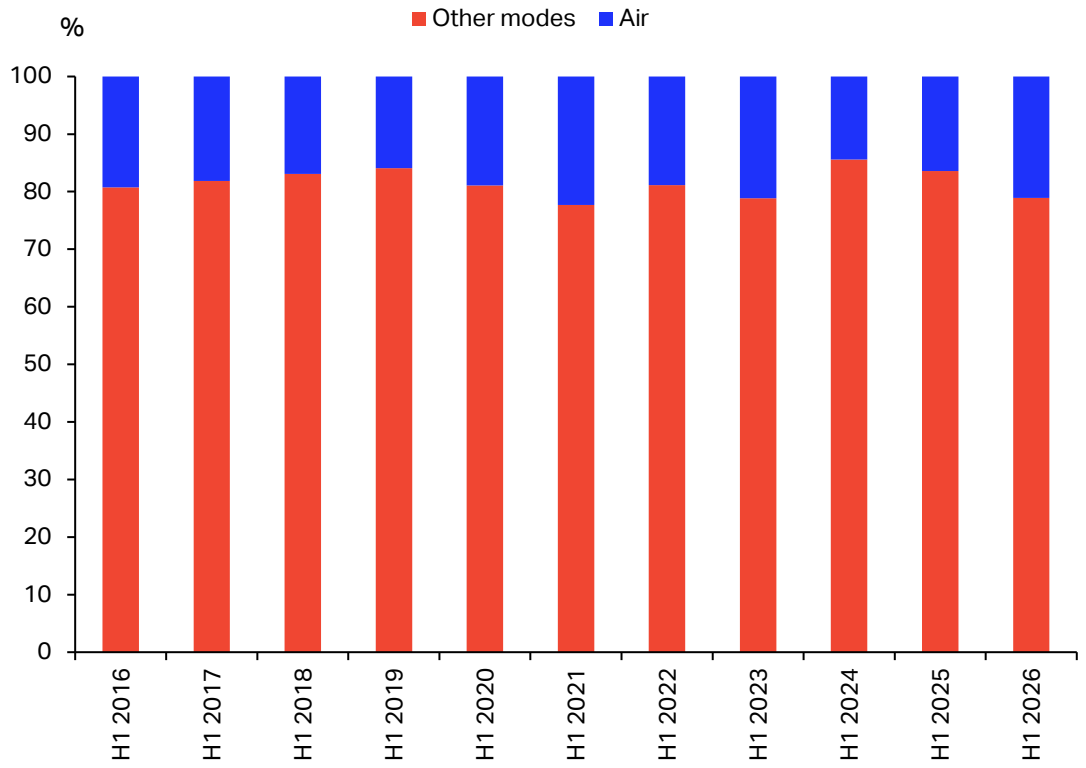
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Air cargo accounted for 21.1% of export value, but only about 0.5% of export weight in H1 2026

Air share of export weight H1 2016–H1 2026



Air share of export value H1 2016–H1 2026

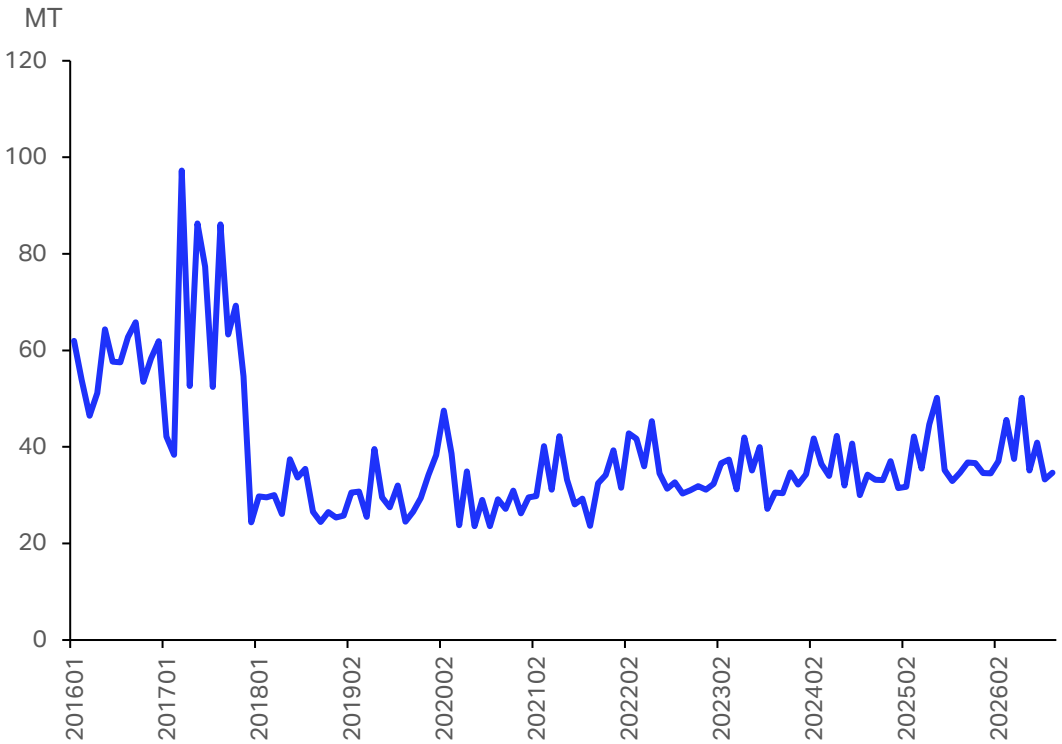


Source: IATA Sustainability and Economics, based on Colombia's National Tax and Customs Directorate (DIAN).

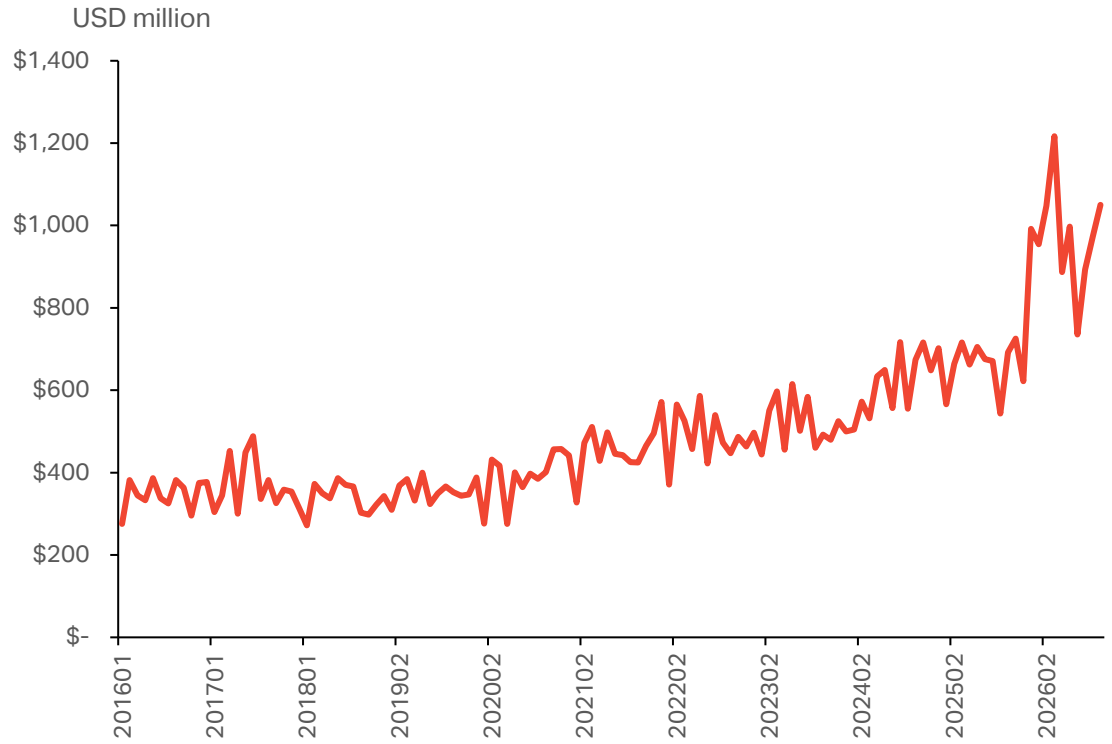
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In the past decade, air export value grew by 11.0% on average per year, while export weight fell by 3.3%

Export weight by air Jan 2016–Sep 2026



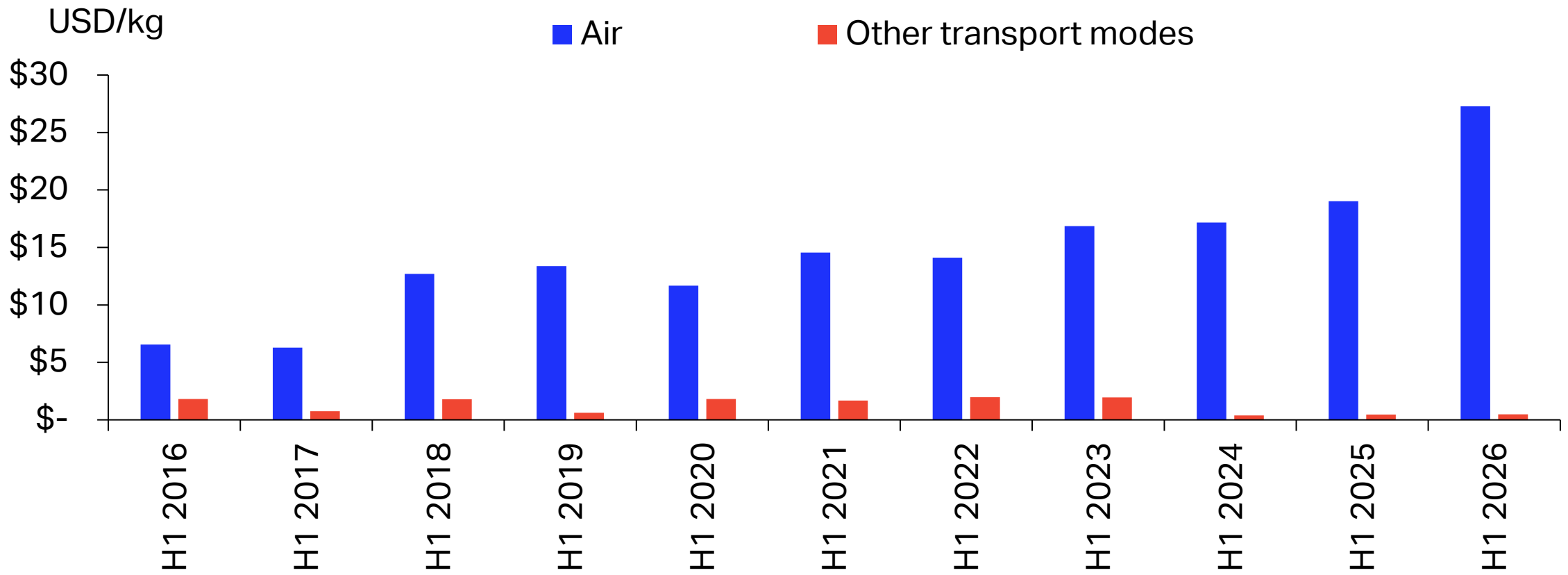
Export value by air Jan 2016–Sep 2026



Source: IATA Sustainability and Economics, based on Colombia's National Tax and Customs Directorate (DIAN).

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The relevance of Air Transport: Exports by air had a much higher value per kg than exports by other transport modes.

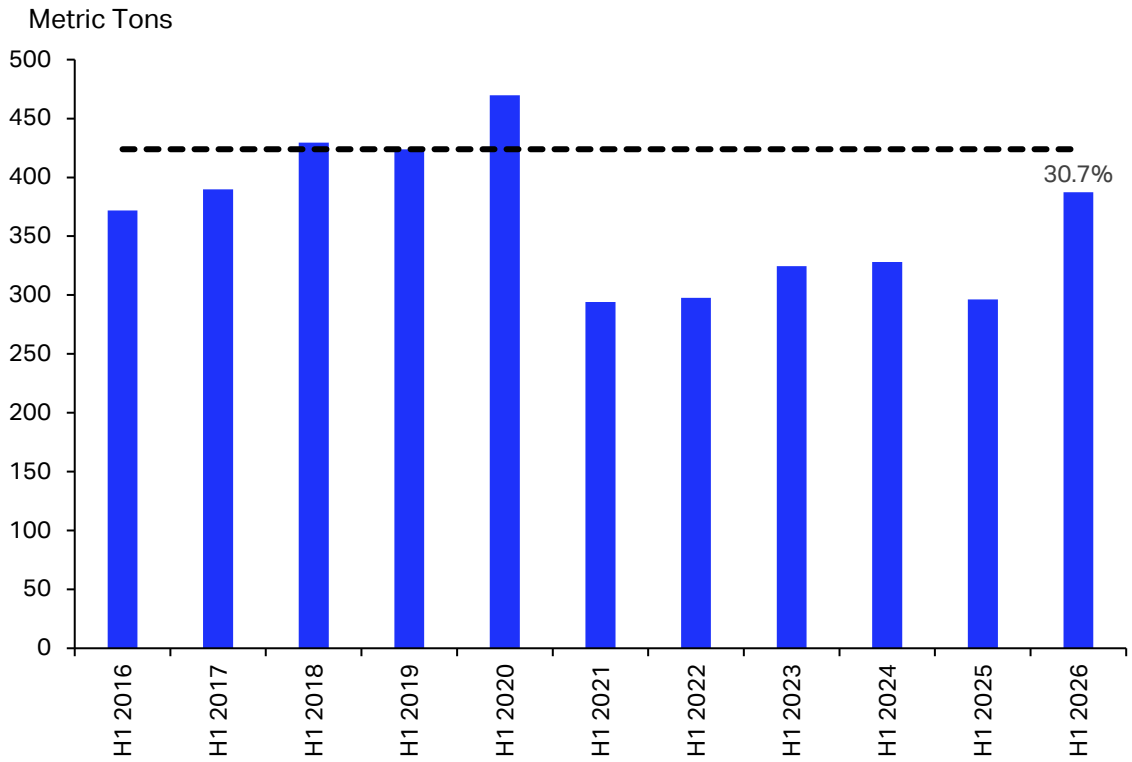


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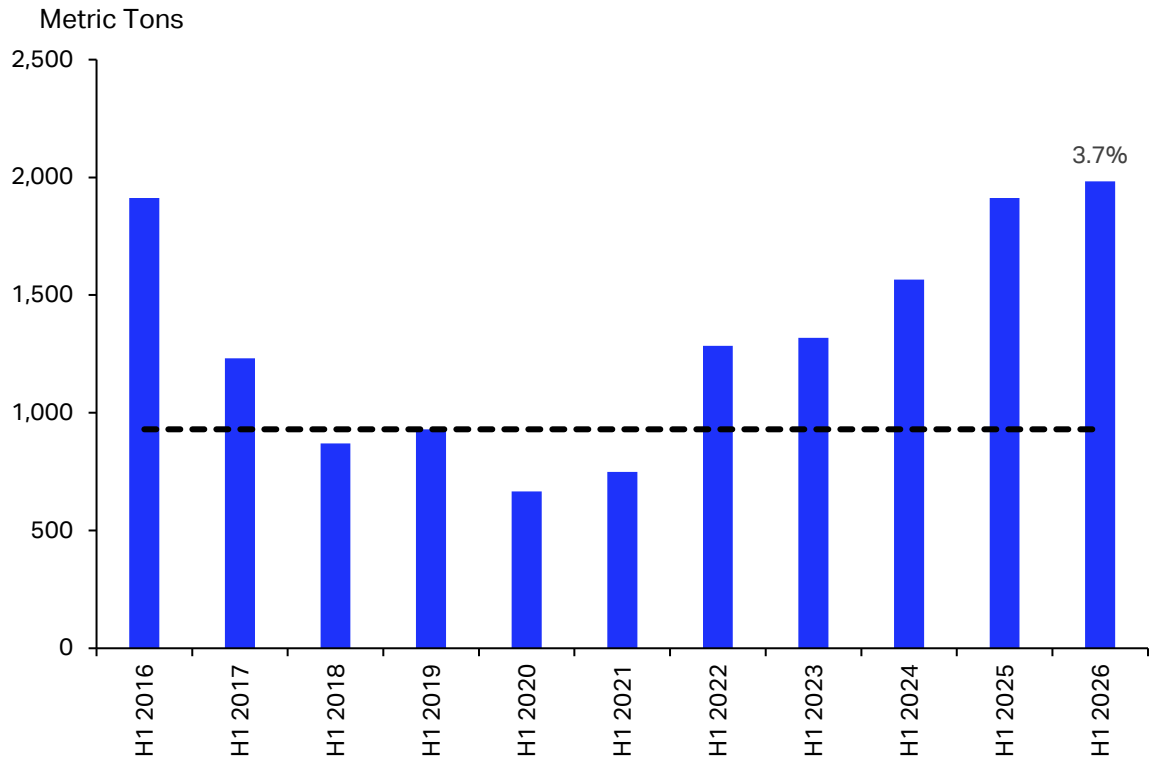
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Air cargo grew year on year in H1 2026, but only belly cargo surpassed 2019 levels

Dedicated cargo H1 2016–H1 2026



Belly cargo H1 2016–H1 2026

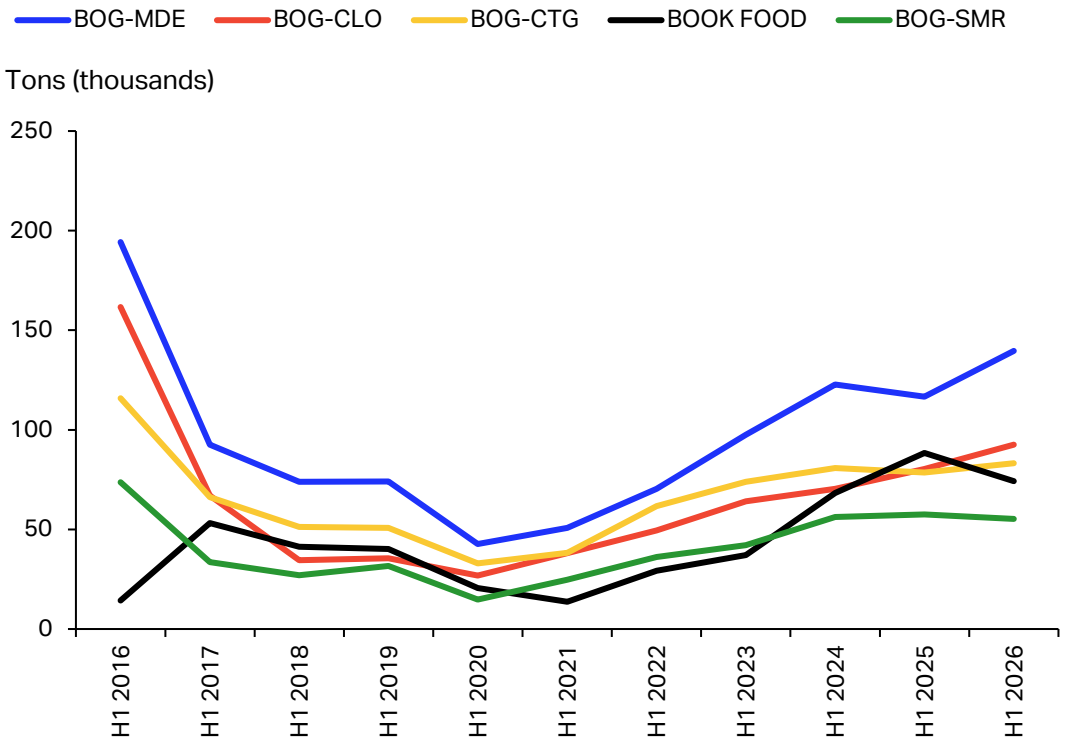


Source: IATA Sustainability and Economics, based on OAG data.

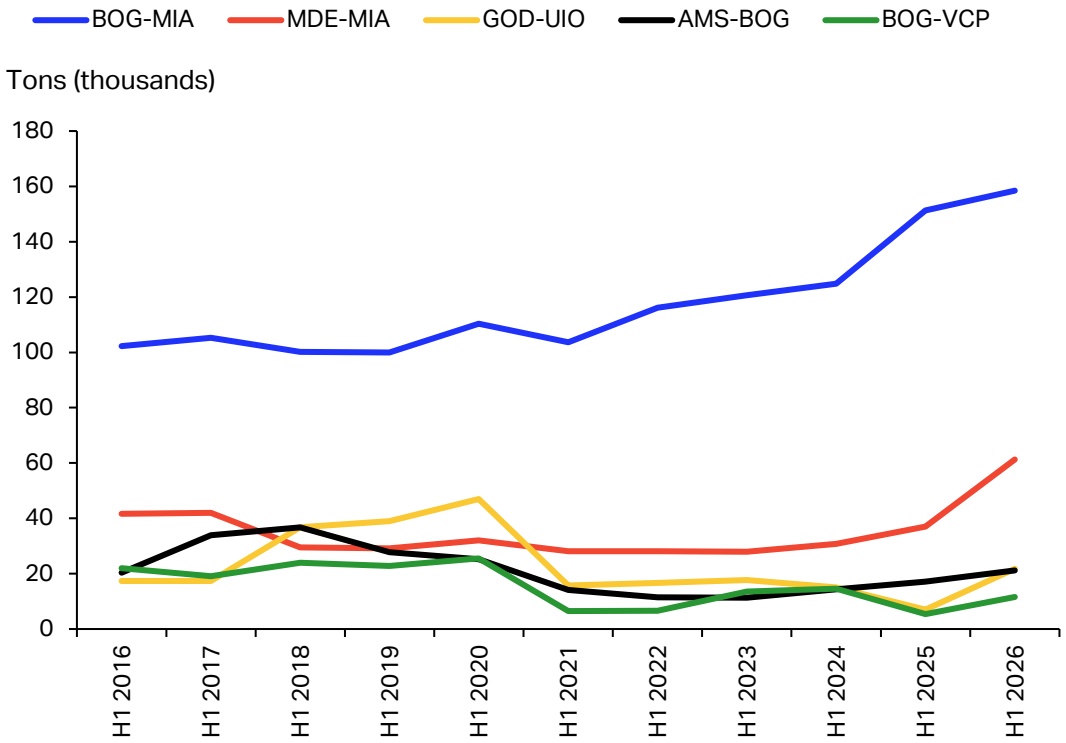
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In H1 2026, the top five dedicated cargo routes all grew year on year, while belly cargo routes had mixed results

Top five belly cargo routes H1 2016–H1 2026



Top five dedicated cargo routes H1 2016–H1 2026

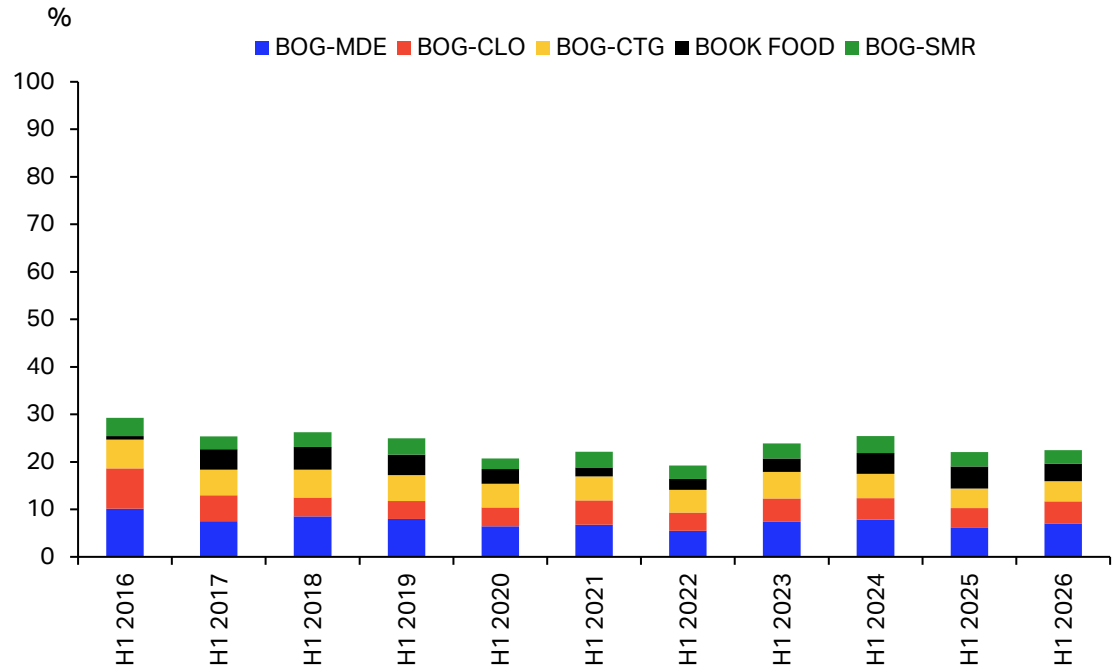


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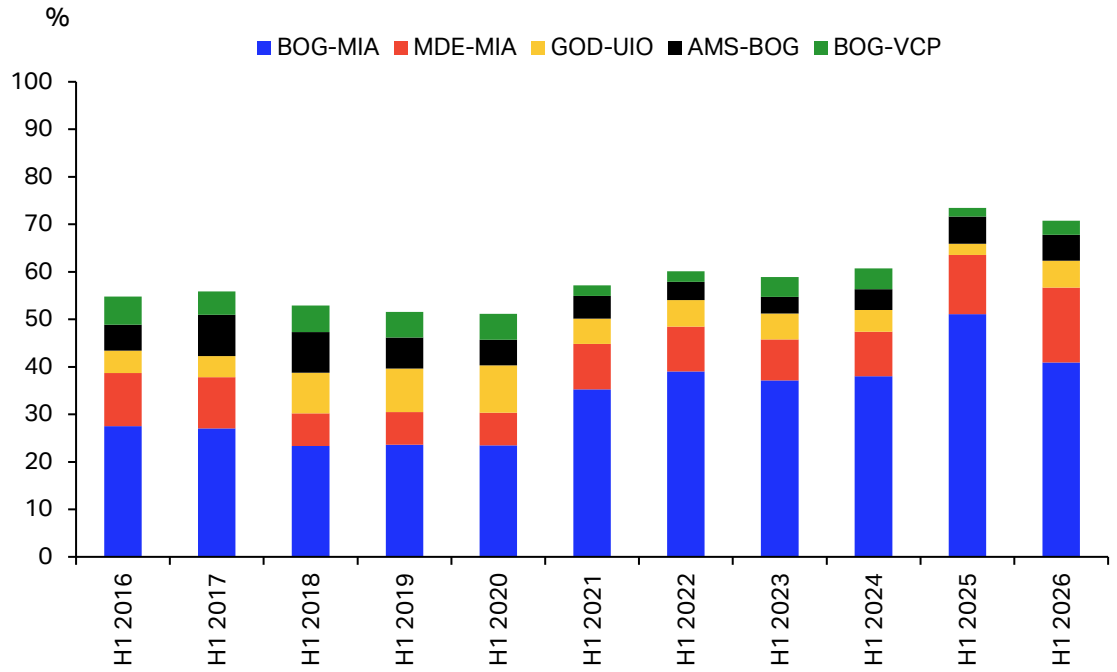
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Cargo traffic on the top five routes in H1 2026: about 70% for dedicated cargo traffic and 22% of belly cargo

Top five belly cargo routes (% of traffic) H1 2016–H1 2026



Top five dedicated cargo routes (% of traffic) H1 2016–H1 2026



Source: IATA Sustainability and Economics, based on OAG data.

Air cargo is where speed becomes economic resilience.

33%

of global trade by value moves in less than 1% of global trade volume

62M+ tonnes annually • ~USD 8.3T in value

“Air cargo does not carry everything. It carries what cannot afford to wait.”



A changed operating environment

Global trade is not disappearing.
It is being rewired.

01 Trade routes are shifting

02 Sourcing is diversifying

03 Rules are fragmenting



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Industry expectations are rising and a regulatory landscape is evolving

More data, earlier in the process

- Advance filings now require **detailed shipment data (incl. HS codes, consignee details)**
- More stringent requirement that go beyond "7+1 data may follow", including **commercial, routing and customer data**

Stricter E-commerce environment

- End of **€150 de minimis** exemption in the EU
- Introduction of **handling fees and new parcel taxation**
- **Increased scrutiny and controls** over growth in parcel volumes
- Lower-yield, deferred e-commerce is increasingly diverted to slower modes, while **healthcare, technology, and urgent B2B** shipments start dominating the air network

Accountability beyond transport

- **Corporate Sustainability Reporting Directive** puts pressure to report emissions and supply chain impact
- Increased requirements on **data integrity, traceability, and origin**
- More responsibility on logistics actors to ensure **end-to-end compliance**



- **60–70%** of shipments contain at least one error, resulting in **3–5 days** of delay
- **Only 27.5%** accuracy of shipment volume declarations
- **Legacy technology** lacks the tools needed to effectively handle today's data demands, which continue growing

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Resilience must be built into the supply chain

Connected data

A shared view of the shipment, using a common language, connected.

Global standards

Interoperability across boarders

Harmonized implementation at industry and country levels

Trusted Operations

Safety, security and capability.

Air cargo value = speed + agility + resilience

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Solutions

Digitalization

ONE Record – the digital backbone for agility.

Data – the backbone for AI & Automation

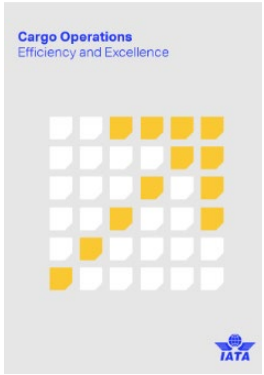
IATA ONE Record

CSD Reform

Harmonize implementation at country level

Align regulation and procedures





Safety of the supply chain

Annex 18 Amendments

- Management of safety risks
- State safety promotion across supply chain

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Air Cargo – The engine of trade flexibility

The future belongs to connected supply chains.

Connected Data: creates visibility

Global Standards: create interoperability

Trusted operations: create confidence

Air Cargo: creates strategic agility



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Thank you!

